

## Sample Workforce Plan Report Outline

Following is one possible model for the workforce plan report/document. This outline will assist you in developing your priority workforce issues and action plans. Adapt it to suit your organization's needs. The word "organization" in this document will be used to refer to the agency, department or division addressed in the plan.

### Section 1: Overview and Executive Summary

- A. Organization mission and vision
- B. Brief organization description
- C. Name of organization's contact person for workforce planning
- D. List of Workforce Planning Team members

### Section 2: Introduction to the Organization's Internal Scan

A brief discussion of key objectives, the organization's challenges and upcoming organizational or business process changes, based on the findings of the organizational scan and gap analysis.

### Section 3: Workforce Analysis - Assessment of Current and Future Needs

- A. Description of the most critical workforce challenges facing the organization (e.g. insufficient pool for key positions, critical skill gaps, etc.)
- B. Critical hiring needs
  - Hard to fill positions?
  - Hard to retain
  - Fills critical core operation
  - High retirement vulnerability
  - Location issues
  - Underutilized for protected groups
- C. Are there specific classifications or job groups that appear to be most challenging in terms of hiring and retaining qualified employees?
- D. Identification of those positions key to agency operations
- E. Status of knowledge transfer or retention strategies
- F. Projected turnover including retirements
- G. What critical skills or key positions will be impacted by turnover?
- H. Discuss new/missing skill sets needed to meet strategic goals.
  - Are the skill sets available in the organization?
  - What specific training and development requirements will be needed?
  - Which skill sets and training needs have statewide impact or require assistance from outside the organization?
- I. If applicable, what are the future IT demands/needs?
- J. Mission impact if challenges go unaddressed?
- K. Current plans underway to address these challenges?

- L. Strategies that have proven successful or unsuccessful?
  - Barriers to the success of action plans?
- M. Process for vacancy management
  - See Appendix for sample forms

#### Section 4: Gap Analysis and Action Plans

- A. Action plans to address workforce challenges
  - Retention strategies
  - Mentoring programs
  - Initiatives to ensure transfer of knowledge
  - Recruitment strategies
  - Training & Development programs
  - Other
- B. Action plans that require involvement from other segments of state government in order to implement (including those that require “enterprise” level participation or assistance)
- C. Persons responsible for each action plan
- D. Timetable for action plans
- E. Measurable goals and critical milestones that can be identified to ensure that workforce needs are met.

#### Evaluation of Planning Process

Provide a description of the results from:

- The Workforce Planning Team’s self assessment
- The internal workforce’s assessment of the planning process
- Leadership’s assessment of the planning process

#### Evaluation of Plan Effectiveness

Describe the methodology and timeline to be used to assess the effectiveness of the implementation of the plan.